

Contact Center as a Service

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Anywhere365® 



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Advanced CCaaS platforms and solutions are becoming mainstream across geographies

The contact center industry is evolving at pace, driven by rapidly changing customer requirements driving intensive change. Evolving enterprise buying behavior, technological demands of new hybrid working models, need for greater efficiency in handling contacts, focus on enhancing CX and the growing complexity of business demands have increased focus on improving customer satisfaction. CX has become a key topic of discussion at the boardroom level.

The adoption of digital CX services has significantly increased during the last three years, with the emergence of the new hybrid working model. A large part of the contact center (and other) workforces continue to work at least part-time from home. Similarly, there is an increase in the use of contact center services and end-user demand for smooth, efficient and quick resolution of issues.

The expansion of throughput brings with it the specter of additional costs/staffing for enterprises operating the CX platform unless automation is deployed to increase the volume of contacts transacted per agent. Enterprises are now looking to adopt cloud contact centers to ensure that these key issues are addressed and are continuously adaptive and flexible.

Enterprises understand the benefits of the cloud contact center. During the last few years, the contact-center-as-a-service (CCaaS) solution has evolved significantly and offers more than basic channels of voice and text communication. The current cloud contact center solutions are designed with a vast array of features and functionalities, including workforce management, retention or optimization and embedded technologies such as AI, ML, automation, chatbots/personas and analytics. Offered as an as-a-service model, the current contact centers are an extremely attractive proposition for enterprises to achieve their business goals at low cost and with low risk while upgrading to state-of-the-art technologies without significant capital investment.

AI and chatbots
are redefining and
streamlining CX
while **boosting**
volumes serviced.



Providers are investing in the continuous development of advanced CX solutions and CCaaS platforms that address the demands from enterprises for as-a-service solutions delivered in real time. They also offer enhanced features sets, including AI and chatbot/persona agent delivery; performance dashboards that create a direct connection between enterprise leadership and their agents; automated coaching, training, agent assistance, gamification, retention and social programs for agents; customer sentiment scoring; and customized avatars, keeping agents motivated and focused even in remote working or gig-worker situations and enhancing the user experience (UX).

With the changing user and enterprise requirements, CCaaS solutions are evolving. Providers are also focusing on addressing some instances of perceived future needs in advance.

Some of the key trends influencing the CX industry include the following:

Enterprises and their leaders are now being reviewed and rated based on their CX scorings and customer satisfaction:

CX and overall customer satisfaction via contact channels are now the major differentiating factors of enterprises. These factors have become the key business performance metrics among many industries and companies. They publish customer satisfaction figures, experience metrics, and actual customer stories. These metrics are used to determine the performance of businesses and their executives, especially the ones that are publicly traded. Ensuring rapid and smooth customer interactions intuitively and expertly has now become crucial for a business' growth rather than designing shopfront transaction sites and engines.

AI is a major driver of advanced and effective CX:

As AI continuously advances in capability and dependability, enterprises have gained significant confidence in the delivery and robustness of operations with humans. AI has become essential in delivering advanced and enhanced CX. AI systems can extract a large

volume of data to augment human capabilities and provide the basis for virtual assistants or self-service information and ease of use. AI also allows a greater volume of transactions to be processed without increasing the number of employees than ever before. AI has, therefore, become critical to the industry and is expected to be integrated into all CCaaS offerings.

AI and chatbots/persona agents or virtual assistants (VA) redefine query resolution: AI goes far beyond just level-1 queries, playing a vital and significant role in query resolution. AI bots can determine the need for human intervention and the level/specialty of the human. Automation handles skill-based routing based on customer requirements, ensuring that the customer is connected only with a relevant and skilled human agent if required. AI bots can also resolve many simple contacts automatically and without human intervention while retaining a high level of customer satisfaction. This increases the number of transactions a center can service per hour enormously without increasing staffing levels and costs. Cloud contact center providers are implementing AI vigorously into their solutions.

They are heavily investing in making contact centers highly AI-driven, with semi-autonomous VA and chatbots as standard offerings.

The use of multicloud migration and solutions is a major trend globally:

Cloud migration and multicloud solutions are a top priority for most enterprises not only for various efficiency and capability reasons, but also, and not least, because the hybrid remote/office working model remains in place and is highly adopted in many countries. Ensuring business continuity while increasing security and agility are additional primary focus areas driving this cloudification trend. Generally, and not just related to the contact center area, we are witnessing accelerated growth in cloud migrations and the adoption of anything-as-a-service (XaaS) platforms. This transformational growth is continuing at a high pace.

Workforce management and improved agent experience are key issues:

Employee and agent experience and management are as important as CX to ensure high-quality outcomes. CCaaS platform and solution providers have invested heavily in most cases to expand their product capabilities to include extensive workforce



management capabilities such as speech analytics, supervision features, real-time coaching functionality and gamification. CCaaS platforms with these features and the development of agent dashboards with built-in analytic functionalities and insights are highly effective as they enable agents to deliver smart and improved results and enhance agent satisfaction.

Advanced social media services have become imperative: Social media channels have rapidly gained traction and importance in the industry. Most industry verticals now have adopted social media as a channel of communication. Customer support and engagement services are being delivered effectively through social media channels. Most companies now employ content moderation services to ensure branding protection, trust and safety of clients' information. With modern CCaaS platforms and their advanced AI and analytics, companies can predict customer sentiments, moderate content and manage their product portfolio to better market their brands.

CCaaS is evolving rapidly and constantly to meet the changing requirements of customers and the industry. AI and ML technologies are integrated into CCaaS solutions to provide a range of benefits to clients, resulting in more satisfied end users without expanding the number of staff, while increasing the overall functionality and flexibility of the CX environment.



A key focus area for the **Contact Center as a Service 2023** study is the in-depth analysis of global CCaaS providers' capabilities.

Simplified Illustration Source: ISG 2023

Contact Center as a Service (CCaaS)

Definition

The ISG Provider Lens™ quadrant report on Contact Center as a Service (CCaaS) focuses on cloud-based platforms and contact center solutions providers.

The contact center industry is undergoing rapid and intensive change, driven by evolving enterprise technological demands for supporting new working models and business demands for higher customer satisfaction.

The adoption of digital CX services has significantly grown over the last three years in conjunction with the reality of the hybrid working model. A large part of the contact center workforce (and others) continues to work from home or in a hybrid home/office situation.

Companies are embracing cloud contact centers to flexibly enable and support a modern work model. This model, along with digital communication and the use of multicloud solutions and edge technologies, has increased the importance of providing quick resolution and highly personalized customer service across channels. Today's CCaaS solutions

are cloud-based and have multiple features and functionalities, including workforce management and optimization, plus embedded technologies such as AI, ML, automation and analytics.

This study assesses providers based on their flexibility to deliver cloud-based platforms and solution capabilities, open architecture, AI and ML capabilities, including speed, reliability, scalability and embedded analytics, and the overall quality of their solutions offered as a service.





Sweet Spot

Anywhere365

Overview

Founded in 2011 in Holland, Anywhere365® operates in more than 60 countries with over 2,000 global customers. Dialogue Cloud is an omnichannel contact center and enterprise dialogue management platform utilizing the Microsoft stack and committed to reducing all unnecessary dialogues. The company's solutions de-silo and converge communications for global companies with complex customer service needs.

Key Provider Capabilities

- **User-friendly CPaaS platform:**

Anywhere365® Dialogue Cloud Infinity is a CPaaS platform that uniquely works native to both ACS and Microsoft Teams. Using this platform, users will quickly adopt software for workforce collaboration and business communications. From its initial conception, Anywhere365® designed the CPaaS platform to be highly intuitive with a user-friendly interface.

- **Continual investments:** Anywhere365® continuously invests to improve and develop solutions for enabling organizations to enhance business results and operational efficiency using its zero-code dialog automation platform, Dialogue Studio, and Aviator its AI suite.

- **Customer communication:** Anywhere365®

Dialogue Studio provides nodes to design and program flows for customer communication. The tool employs a drag and drop principle to bring nodes to a canvas without the knowledge of code language. After completing or changing a flow, the user clicks a button to complete the deployment and activation.

- **Web Agent for hybrid working:** This is designed to increase productivity, empower client teams and provide the best CX. Anywhere365® Web Agent integrates with Microsoft Dynamics 365, Salesforce, ServiceNow, SAP, Bullhorn and 30 other 30 CRM systems. Anywhere365® Dialogue Cloud Infinity delivers critical information to Microsoft Teams or ACS users on their desktop or mobile device while working in a hybrid environment.

- **Comprehensive contact center reporting:**

The company's Reporting & Dialogue Intelligence tool based on data mining techniques enables the integration of comprehensive business and dialogue intelligence, allowing immediate remedial action when required.

- **Customized deployment models:**

Anywhere365® Dialogue Cloud Infinity offers deployment models to suit any business based on clients' customization, workflow integration and advanced features requirements.

Benefits Delivered

Anywhere365® includes the benefits of:

- **CCaaS (agent-based) with flexible usage pricing, low costs, easy scalability and centralized reporting, delivering quality customer engagement**
- **CPaaS (platform-based) using the robust Anywhere365® platform and APIs operating in Azure cloud to create service offerings and application integrations**



Anywhere365

Sweet Spot

The Anywhere365® Cloud Contact Center solution was conceptualized from a vision to reduce all unnecessary dialogues and converge all data from available sources to make customers part of the business processes. This process enables phenomenal omnichannel CX and automates dialogues to enhance productivity. Anywhere365® is uniquely built to the Microsoft 365 ecosystem. It utilizes Azure for architecture, Teams as a user environment and PowerBI for reporting and intelligence.

Anywhere365® exhibits healthy revenue growth and stable finances, yielding an accelerated global market share and partner ecosystem growth.

Its customer reputation is excellent, evidenced by a client churn rate of less than 2 percent in 2022.

Anywhere365® software enables clients to transform into modern data-driven CX companies. The software helps route dialogues so that customers receive the right information at the right time, regardless of location. AI bots utilizing customer CRM data answer routine questions. Dialogues that cannot be handled by bots are routed to live agents based on criteria such as skills, geography and CRM data. With Aviator capabilities, these agents can work fully augmented. Anywhere365® is committed to delivering exceptional technology and service, enabling customers to streamline their CX delivery.

Key differentiators are listed as follows:

- Fully leverage all customer investments in the Microsoft stack
- Native to Microsoft Teams, offers significant ease of use and large-scale adoption by agents
- Complete chatbot and voice bot automation through unique low-code/no-code Dialogue Studio
- Quick deployment by partner utilization within a day, with a new deployment API
- Consumption-based rather than seat-based pricing model, allowing flexible scaling and correct sizing and cost for clients
- Unique centralized dialogue reporting throughout the entire enterprise

Future roadmap

Further roadmap actions planned for continued success are listed below:

- **Release of Aviator – Agent Assist:** This is an autocomplete, reply and solution suggestion, and agent-controlled bot (autoflow). This omnichannel bot predicts the next-best agent solutions, enabling multiple data sources training.
- **Continue to innovate user experience:** Anywhere365® focuses on releasing Design System - a shared design language and UI library. It also reinforces and strengthens its brand identity and improves user interaction (UI) look, feel and flow optimization.
- **Geo expansion:** Current diversified operating regions are profitable. Further countries and regions will be carefully considered for future expansion.





Appendix

The ISG Provider Lens™ 2023 – Contact Center as a Service research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of July 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Contact Center as a Service market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Author



Dr. Kenn D Walters
Distinguished Lead Analyst

Dr. Kenn Walters is a highly skilled senior executive with over 40 years of experience directing and managing major transformational technology projects, research and development programs, as well as extensive experience within providers and in global industry research and management consultancy. For ISG, Kenn has written over 100 articles as a distinguished lead analyst for ISG Insights in areas such as digital transformation, cloud managed networks, SD networking, SDN and digital disruptors.

He is a lead analyst and author for multiple regions in the Provider Lens™ reports, in such areas as Networks – Software Defined Networking, Digital Business Software and Services, Contact Center as a service and CC CX. He holds BSc, MSc and PhD in computer science and communications, is a member of the N.Y. Academy of Sciences and a Fellow of the British Computing Society.

Research Analyst



Sandya Kattimani
Senior Research Analyst

Sandya Kattimani is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Contact Center, Life Sciences, Mainframes. Sandya has over 6 years of experience in the technology research industry and in her prior role, she carried out research delivery for both primary and secondary research capabilities. Her area of expertise lies in Competitive Intelligence, Customer Journey Analysis, Battle Cards, Market analysis and digital transformation.

She is responsible for authoring the enterprise content and the global summary report, highlighting regional as well as global market trends and insights. Prior to this role she has worked as technology research analyst, where she was responsible for project work which includes detail technology scouting, competitive intelligence, company analysis, technologies study and other ad-hoc business research assignments.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens research, please visit this [webpage](#).

ISG Research™

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





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